Using Worklists

Step	Action
1.	You can open your **Worklist** using the folders and links in the **menu pagelet** or clicking the link in the **universal navigation header**. For this simulation, use the **Worklist** link in the universal navigation header**.** Click the **Worklist** link. Worklist
2.	Your worklist displays. In this simulation, the worklist is for an Agency AP Approver Set B. You would see your own personal worklist, since the worklist shown is tied to the login for SMART.
3.	The Worklist page is best viewed when the navigation pagelet is closed. Click the **Collapse Menu** button.
4.	The **Worklist** page provides summary information about all items in your personal worklist. From this page, you can: • View additional details about each work item • Perform an approval of the work item • Reassign work items to a different Approver • Sort work items according to the data in that column
5.	The **From** field displays who triggered the work item. This could be an individual or may be tied to a SMART process area.
6.	The **Date From** field displays when the work item was triggered.
7.	The **Work Item** field displays the type of activities that need to be worked. You can have multiple entries all with the same work item. Each of these entries represents a task that requires your attention.
8.	The **Worked By Activity** field displays the activity that needs to be worked, by worklist item.
9.	The **Priority** field is an optional field that lets you assign a priority to items in your worklist. The State of Kansas uses: • blank – no priority • 1 – high priority • 2 – medium priority • 3 – low priority

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10.	When you select items to work on from your worklist, SMART automatically navigates to the pages you need. This lets you skip using the **menu pagelet** and **navigation page** to go to components and pages. The **Link** column enables you to work an item from the **Worklist** page. Click the **03400, 00000018, TEST8888, 72** link. 
11.	SMART takes you to the page where you can perform the required task. When you have worked the item, it is automatically removed from your worklist. You can also manually mark an item as worked in the worklist. Click the **View Worklist** button to return to your worklist. 
12.	You may want to use the **Mark Worked** button to manually mark an item as worked if an entry is a simple notification and needs no follow-up. Clicking the **Mark Worked** button removes the item from your list. **Note:** You cannot mark an item as worked when the **Mark Worked** button is grayed out.
13.	The **Reassign** button lets you reassign a worklist item to another user. **Note:** You cannot reassign a worklist item when the Reassign button is grayed out.
14.	The **Worklist Details** page includes all the information from the **Worklist** page, plus additional information about items on your worklist. Click the **Detail View** link. 
15.	Notice that the time displays for each worklist item in the **Date From** column.
16.	There is also a **Business Process Name** column on the **Worklist Details** page.
17.	Click the bottom scrollbar.
18.	The **Previous User** field displays the user whose action triggered this item.
19.	The **Selected Dttm** field displays the date and time when you first selected this item in order to work on it.
20.	If the item was forwarded from another user, the reason for reassignment is displayed in the **Comment** field.
21.	The **Instance** is a unique identifier for each item of the same type.
22.	The **Transaction** is a unique identifier for each item in the worklist.
23.	Click the bottom scrollbar.
24.	**Nice work!** You have successfully completed the **Using Worklists** topic. **End of Procedure.**